



OneFinance Strategic Initiative

EXECUTIVE SUMMARY

OneFinance North Star

To enable Yale’s mission, simplify and standardize financial services in order to make life easier where everyone has a role in building a strong culture of financial integrity, insight and stewardship of Yale resources.

PROGRAM TEAM

Program Sponsors

Stephen Murphy
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Steering Committee

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Program Leads

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Change Management

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Process Improvement & Enablement

Joy Ebanks-Frederick
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PROGRAM GOALS

- ❑ **Connecting:** Build a more unified finance function campus-wide
- ❑ **Simplifying:** Simplify and standardize financial processes, supported by better reporting and analytics
- ❑ **Monitoring:** Implement central monitoring (data, site visits) for quality and controls
- ❑ **Training:** Train and develop financial professionals campus-wide
- ❑ **Culture:** Strengthen a culture of integrity and accountability among faculty and staff

FOCUS AREAS

Source to Pay (S2P)

Standard Operating Procedures (SOPs)

Finance Training

Central Monitoring
(Dashboards, Central Reviews)

Payroll

Other Financial Processes Based on an
Assessment of Risk, User Impact, Cost-Benefit

BENEFITS

- ❑ Enhances institutional reputation
- ❑ Strengthen ability to attract and recruit high quality talent
- ❑ Improves financial stewardship and compliance
- ❑ Establishes expectations to hold people accountable
- ❑ Facilitates your work; reduces barriers to achieve your expectations; informs your decisions
- ❑ Positively impacts your ability to do research, educate and provide service and confidence in financial management
- ❑ Protects and supports you in how you get your job done and in doing the right thing; a positive work environment